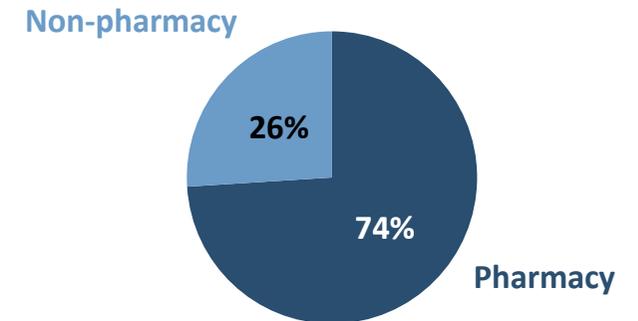


Australia | Overview

Legal status of selected CCA ingredients in Australia		
Ingredient	Status	Additional notes
acetylcysteine	P	
ambroxol	–	
beclometasone	P	Maximum dose 50mcg, maximum pack size 200 doses
benzocaine	P	Oral topical use
budesonide	P	Maximum dose 64mcg
carbocisteine	–	
cetirizine	M	
chlorphenamine	P	In combination with other decongestants, including in day and night combination packs
dextromethorphan	P	Maximum daily dose 120mg
desloratadine	P	
diphenhydramine	P	In combination with other decongestants, including in day and night combination packs
fexofenadine	M	Maximum mass market dose 60mg for over-6s and 180mg for over-12s
flurbiprofen	M	Maximum dose 10mg
fluticasone	P	
levocetirizine	P	Maximum dose 5mg
mometasone	P	
naphazoline	P	
pseudoephedrine	P	

Australia CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)



Systemic cold & flu



Cough remedies



Sore throat rems & medicated confectionery



Topical decongestants



Systemic decongestants



Chest rubs & inhalants

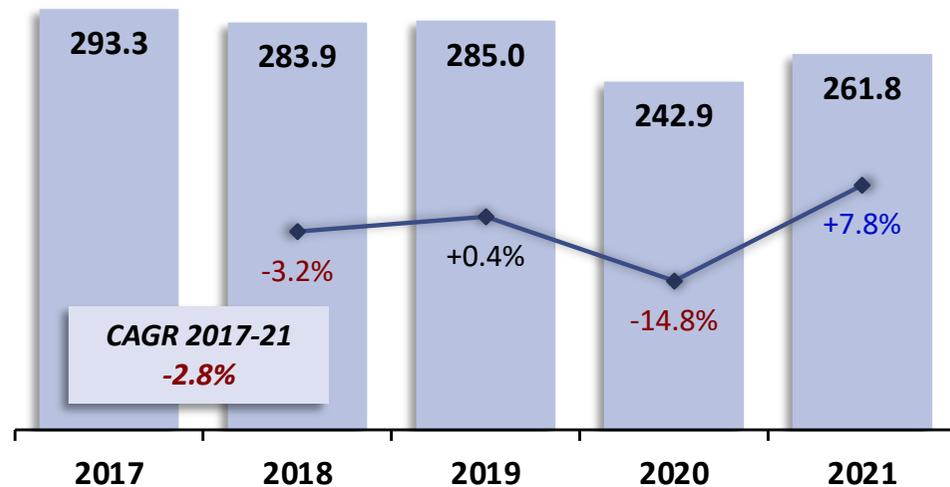


Allergy remedies



France | Sore throat remedies & medicated confectionery

France sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)



Key trends & developments

- Category affected by the reverse-switch of flurbiprofen pastilles in May 2019 and enforced move of alpha-amylase brands BTC in January 2020
- Medicated confectionery brands tended to hold up better than registered medicines during the Covid-19 pandemic, as they benefited from mass market availability
- Key brands such as Strepsils and Lysopaine face growing generic competition

- Herbal extracts-based medicated confectionery brand **Ricola** dominates the category, aided by high-profile consumer promotion, positioning for year-round freshness, as well as frequent line extensions and new flavours
- A decline of only 1% in 2020 was a relatively good result in the difficult environment, with impulse purchases at checkouts and wider mass market availability helping to maintain revenue
- 2021 A+P for Activ'Air versions showed a man unable to see produce at a food market owing to a blocked nose, before a Ricola lozenge delivers "A feeling of breathing freely"
- Packaging for the core Ricola lozenge line was gradually updated from summer 2021 to better highlight its Swiss Alp plant-based formulation and carry the tagline "naturally good"; latest line extensions include Sève de Pin des Alpes (alpine pine sap) and Honey Sweetness flavours



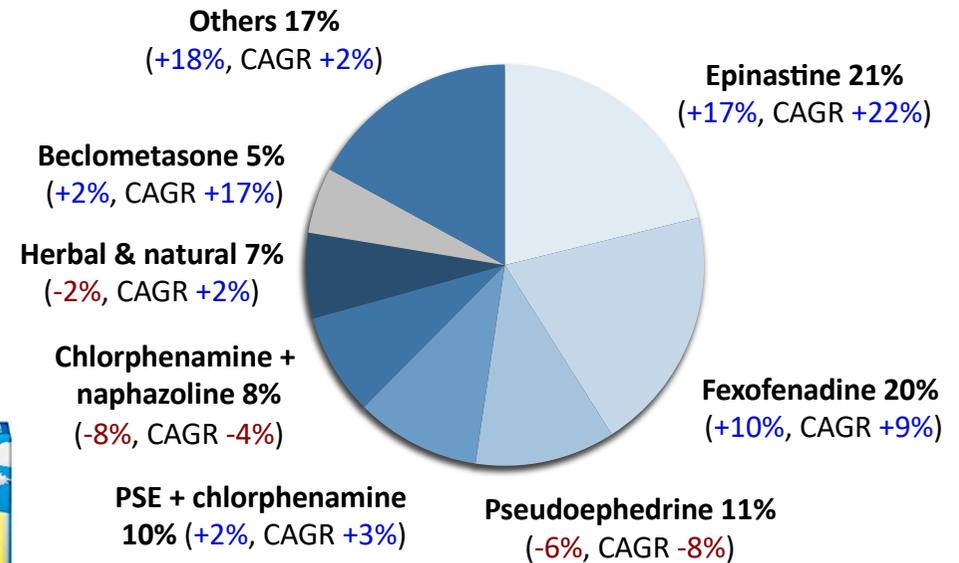
A man's blocked nose makes him unable to see the fresh produce at the market... which is solved by Ricola Activ'Air

Japan | Allergy remedies

- **Chikunain** is another nasal decongestant brand which extends into allergy remedies, via traditionally-formulated Chikunain A and B
- **Claritin** was a standout performer thanks to rollout of a 28-count pack of Claritin EX in October 2021 and downscheduling of key presentations since 2020
- Claritin EX and orodispersible version Claritin EX OD were reclassified from Instruction-Required Drugs to Class I OTC in 2020, and subsequently to Class II OTC in 2021 allowing mass market sale



Japan allergy remedies sales by ingredient 2021 (MSP, \$mn)

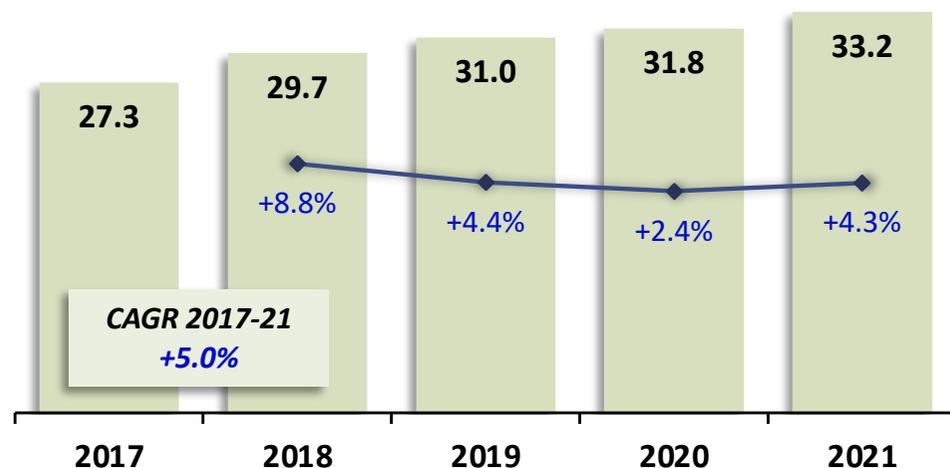


Many brands contain numerous active ingredients in combination; segments represent principal identified ingredients. Others includes loratadine, azelastine and phenylephrine

- To capitalize on this increased availability, Taisho increased investment in A+P, appointing celebrity singer Sho Sakurai as brand ambassador (*see above*); ads highlight once-daily, non-drowsy formula
- **Talion AR** (Mitsubishi Tanabe) launched in December 2020, Japan's first bepotastine besilate OTC supported by ads highlighting improved speed of action and tolerability compared to other antihistamines, and targeted professional demographics who need rapid relief from allergy symptoms at work (*see right*)



Poland immune supplements sales 2017-21
(MSP, \$mn)



- Leading brand **Sambucol** is marketed as “the best-researched elderberry brand”, with website highlighting over ten years of availability in Poland and brand’s wide geographic reach
- Ads explain how brand “supports normal function of the immune system” (see right)
- **Pelavo** is a dynamic range of immunity and CCA-focused supplements, primarily focused on paediatric health and featuring pelargonium extract as a core ingredient, plus zinc and vitamin C
- Range comprises Multi for over-3s and over-6s (with added linden), Bronchial for immunity, irritation of the throat and respiratory health (with Icelandic moss) and Nose & Sinuses for respiratory health (with bromelain)

Key trends & developments

- Immune supplements category in Poland did not see same pandemic-driven spike in demand as other markets, instead continuing trend of steady single-digit growth 2019-21
- Polish consumers have historically favoured herbal & natural supplements such as garlic, single vitamins and minerals to support immunity, holding back demand for immune supplements category
- However, category has seen significantly increased NPD since 2020, which may drive topline growth
- One area seeing growing marketer interest is immunity supplements for pregnant woman and new mothers



Brand Case Studies | Flonase

- Current US promotion for Flonase includes “Face Your Monster” family-focused campaign, which uses augmented reality and social media to allow consumers to create a personalised “Allergy Monster” representing their symptoms, and upload pictures of it to social media to enter a competition with prizes including a holiday
- “Change the Game” campaign, introduced in 2021, focuses on how brand is the official allergy relief partner of the MLB baseball league, and includes endorsement from professional baseball player Cody Bellinger
- While non-US sales currently account for only 13% of total brand topline, it has a relatively broad international presence, with China next largest market; focus of promotion there is similar to USA, with emphasis on once-daily 24-hour symptom relief
- Expansion in China faced challenge of a market with low uptake of nasal sprays for allergy and historical lack of awareness among consumers of self-medication options; while brand has been available via e-Commerce channels in China for significant period of time, it was a 2017 shift in marketing strategy that helped increase visibility



- GSK partnered with Mediacom to track store visits and web activity, identifying that the “family health carer” demographic group represented a large untapped consumer base; by increasing focus of web promotion on this group, brand enjoyed a significant upturn in first-time purchases
- Flonase switched in Canada in 2016, although sales have yet to see significant growth and it sits just outside the Top 5 allergy remedies there
- Most recent launches for Flonase are UK and Japan, both in 2019; in former, switch was approved in 2018, with the brand launching the following year as Pirinase under the wider Piriton allergy range
- In Japan it is marketed as Flunase and was the country’s first OTC fluticasone brand, although has yet to make significant impact on allergy topline there